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Publication date:
2017

Document version
Peer reviewed version

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Citation for published version (APA):
Svendsen, M., & H. Thomasen, C. (2017). *Knowledge Exchange Consensus: Monitoring of Open Access Publications and Cost Data*. Abstract from The 46th LIBER Annual Conference, Patras, Greece.
<http://liber2017.library.upatras.gr/programme/>

Abstract of Contribution 121

ID: 121

Paper

Topics: Strategy and Innovation, Sustainability, Knowledge and Data Management

Keywords: Open Access, APC, monitoring, metadata, repositories

Knowledge Exchange Consensus: Monitoring of Open Access publications and cost data

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Background

Knowledge Exchange (KE) has in recent years actively been focusing on activities of monitoring Open Access (OA). KE consists of six European organisations working together to support the development of digital infrastructure to enable open scholarship. As a result of two international workshops held in 2015 and 2016 both challenges and solutions to monitoring of OA publications and derived cost data were addressed, and a series of practice-based recommendations are now formed as the *Knowledge Exchange Consensus on monitoring of OA*.

Purpose and method

In a changing landscape towards increasing OA publishing, it has become necessary for universities and at an aggregated national and international level to monitor OA publications and cost data related to different types of business models in the publishing market. Furthermore, a standardised monitoring of OA publishing and costs is a prerequisite for sustainability of institutional budget allocations in times of economic restraints.

The purpose of increased international cooperation in the workshops was achieved through a mixed qualitative method of status reporting from KE country partners laying the baseline for setting up breakout groups to discuss selected topics in depth with the purpose of highlighting the monitoring needs of:

- quality in collecting data from sources
- efficiency in monitoring workflows
- aggregation of data via usage of standards
- alignment across the policy landscape

Objective

With these workshop series KE has set a clear goal of pushing towards more transparent exchange of metadata of OA and cost data. The long-term goal to successfully increase fairer OA publishing relies on transparency of data from publishers, institutions and countries in order to gain an economic review of the Total Cost of Publication (TCP). In pushing for transparency and shared optimization of OA monitoring the workshops has delivered a concordant objective of recommendations that can influence evidence based policy making, helping streamline economical spending and promoting better outcomes of negotiations with publishers.

Conclusions

Metadata standards and common definitions of OA publications are crucial and do exist. When new standards are needed they should be added to existing protocols. Policies and agreements should require publishers to deliver data in ways that make the workflows open and transparent. Repositories or CRIS's should be used as sources for monitoring.

When monitoring OA cost data accounting systems and repositories should be interoperable so that cost data at all levels can be easily retrieved. Data should be open and shareable, thus the DOI becoming a key tool. Publishers should be required to enter the needed data such as license, DOI, corresponding author and APC in the publication metadata as well as in the publications themselves. Such requirements should be settled in contracts with the publishers avoiding non-disclosure regulations at all time.

A transparent overview of the TCP is a key concept and it's important for consortia as well as for HEI to be able to dissect costs of publishing carefully, underlining that the APC does not cover all costs of publication.

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